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(I hosted this web seminar, which featured Matt Matrisian, head of client growth at AssetMark, and Ken Chee, director of wealth management solutions at AssetMark.)

Web Seminar - Save 11 hours a week: Elevate your practice with outsourced investment & tax management

Past event date: December 10, 2024

Available on-demand: 60 Minutes

Sponsor Content from AssetMark

Why are you still buried in portfolio management and tax oversight? It's time to break free from the grind and focus on what actually helps drive your business forward. If you're not outsourcing investment and tax management services, you could be wasting valuable time—and it could cost you growth, clients, and profits. The result? More time to concentrate on building relationships, delivering high-impact advice, and scaling your book of business.

Stop grinding on the backend. Start scaling up your practice. This webinar is for financial advisors who want to stop trading time for dollars and start driving real growth by outsourcing the tasks that don't need your personal touch. Register now to discover how outsourcing investment and tax management services can be the game-changer you've been looking for!